

Help Desk Data Migration Checklist

Use this checklist to get your data organized and set your team off to a strong start in their new helpdesk

Source platform

Target platform:

1

Before the migration

- ☐ Create Agent profiles in the new help desk if the notice in the Migration Wizard tells you so.
- ☐ Reassign Tickets from Agents that won't be added in the new platform. Otherwise, during the migration, they will be assigned to a default Agent.
- ☐ Disable Agent and Requester notifications (if migrating to Freshdesk/Freshservice)
- ☐ Create all necessary custom fields in your new help desk.
- ☐ Make sure you have admin rights for the source and target help desk.
- ☐ Reach out to your new help desk vendor and request a temporary increase to your API limit to speed up the migration.
- ☐ Perform a Free Demo Migration before transferring all data.
- ☐ Find a quiet time to start the Full Data Migration.

2

During the migration

- ☐ Don't change or delete anything to avoid any hiccups.

3

After the migration

- ☐ Check if the records migrated adequately.
- ☐ Redirect all your incoming support channels to the new platform
- ☐ Enable Automation and Notifications.
- ☐ Update internal links in your knowledge base articles.
- ☐ Leave [your feedback](#)

